



To: Joel Boyd, Superintendent
From: Billie Jo Turner, Assistant Superintendent of Finance/CFO
RE: Change of Title – Grants Manager to Budget and Grants Analyst
Date: September 29, 2021

The position of Grants Manager is scheduled to be vacant on October 15th. This needs to be posted. However, I recommend a change in title and job description since this position has evolved over the years to include more than just grants management. The increase in duties does not warrant an increase in pay. **Thus, this recommendation is budget neutral.**

The change in title and job duties is to simply have both more accurately reflect the true nature of the job. Personally, I served as the Budget Analyst starting in 1998. When the Grants Manager resigned, I took over the duties with the intention of it being temporary. I soon realized that I would be able to handle both positions since the duties of both complement each other rather than overlap in time. In other words, the budget season is the slow season for grants and the busy season for grants is the slow season for the general fund/budget. This held true for the current Grants Manager as well. I have attached the old Grants Manager job description and the suggested new Budget and Grants Manager job description. The added duties have been highlighted and italicized for your review and listed below. This is a long standing existing position that just needs to be modified to reflect the duties of the position.

- Assists in the management and monitoring of the general fund, including reviewing financial records, processing budget and/or expenditure transfer requests, preparing staff salary projections, approving requisitions for all schools and departments within the Central Office.
- Collaborate with the Transportation Director to project the annual transportation budget.
- Prepare and file the annual DESE End of Year report and coordinate the corresponding annual third-party independent audit.
- Developed and implemented internal controls to manage timely and appropriate processing of invoices.
- Respond to requests for information from other departments, staff and vendors regarding the status of accounts, available funds request, staff reimbursements and vendor payment status.
- Provide training to school department staff on the use of municipal computerized financial systems and software.
- Serve on the Finance Leadership Team with CFO, Deputy CFO, Internal Auditor and Payroll Supervisor.

Again, please note this change in title and duties will not have a monetary impact.

BUDGET AND GRANTS MANAGER

Lowell Public Schools

Lowell, Massachusetts

Job Details

- **Job ID:** 3685227
- **Application Deadline:** Posted until Filled
- **Posted :** September 28, 2021
- **Starting Date:** Immediately

Job Description

DUTIES AND RESPONSIBILITIES

- Manage and maintain multi-million dollar Federal, State and Private funded grant budgets.
- Develop, implement and administer a district-wide system for monitoring grants, including the submission of applications, request and receipt of funds, establishment of grant budgets, filing of grant amendments and the filing of required financial reports.
- Ensure proper grant funded budgets and financial records are maintained to meet State and Federal audit requirements.
- Serve as a liaison between the School Department and other city departments to ensure the proper accounting and tracking of grant and general funds.
- *Assists in the management and monitoring of the general fund, including reviewing financial records, processing budget and/or expenditure transfer requests, preparing staff salary projections, approving requisitions for all schools and departments within the Central Office.*
- *Collaborate with the Transportation Director to project the annual transportation budget.*
- *Prepare and file the annual DESE End of Year report and coordinate the corresponding annual third-party independent audit.*
- *Developed and implemented internal controls to manage timely and appropriate processing of invoices.*
- *Respond to requests for information from other departments, staff and vendors regarding the status of accounts, available funds request, staff reimbursements and vendor payment status.*
- Supervise grant department staff.
- Assist in the development, preparation and implementation of all grant contracts as well as the preparation of specifications for all grant Requests for Proposals (R.F.P.) and/or bids.
- Submit the district's annual Erate applications, which includes meeting all file maintenance requirements and payment submissions.
- *Provide training to school department staff on the use of municipal computerized financial systems and software.*
- *Serve on the Finance Leadership Team with CFO, Deputy CFO, Internal Auditor and Payroll Supervisor.*
- Perform other related duties as assigned by the Chief Financial Officer.

- **Position Type:** Full-time
- **Positions Available:** 1

- Job Categories : Administrator > Business/Finance
Support Staff > Accounting/Bookkeeping
Support Staff > Administrative Assistant

Equal Opportunity Employer

Lowell Public Schools is committed to maintaining a work and learning environment free from discrimination on the basis of race, color, religion, national origin, pregnancy, gender identity, sexual orientation, marital/civil union status, ancestry, place of birth, age, citizenship status, veteran status, political affiliation, genetic information or disability, as defined and required by state and federal laws. Additionally, we prohibit retaliation against individuals who oppose such discrimination and harassment or who participate in an equal opportunity investigation.

Job Requirements

- **PROFFESIONAL QUALIFICATIONS:**

- 1.A bachelor's degree in business, accounting or finance from an accredited college or university.
- 2.A minimum of two years successful experience in accounting or finance. Municipal accounting or finance experience preferred.
- 3.Demonstrated experience in preparing, expending and monitoring grant budgets.
- 4.Demonstrated ability to develop positive interpersonal relationships within all levels of an organization.
- 5.Excellent oral and written communication skills.
- 6.Excellent organizational and administrative abilities.
- 7.Experience in municipal accounting and financial systems, spreadsheets, word processing applications, database applications, budgetary systems, financial control systems and training of staff preferred.

REPORTS TO: Chief Financial Officer

EFFECTIVE DATE OF EMPLOYMENT: As soon as possible after posting period closes

TERMS OF EMPLOYMENT: Twelve month employee

SALARY: \$ 65,000 to \$ 75,000 annually

- At least 2 years of relevant experience preferred
- Bachelor degree preferred
- Citizenship, residency or work visa required

GRANTS MANAGER, BUSINESS OFFICE

Lowell Public Schools

Lowell, Massachusetts

Job Details

- **Job ID:** 3685227
- **Application Deadline:** Posted until Filled
- **Posted :** September 28, 2021
- **Starting Date:** Immediately

Job Description

DUTIES AND RESPONSIBILITIES

1. Develop, implement and administer a district-wide system for monitoring grants, including the submission of grant applications, receipt of funds, establishment of grant budgets, expenditure of grant funds, filing of grant amendments, request of grant funds and the filing of required financial reports (including the final expenditure and end of the year reports).
2. Assist in the development, preparation and implementation of all grant contracts as well as the preparation of specifications for all grant Requests for Proposals (R.F.P.) and/or bids.
3. Ensure proper grant fund budgets and financial records are maintained to meet state and federal audit requirements.
4. Submit the district's annual Erate applications, which includes meeting all file maintenance requirements and payment submissions.
5. Serve as a liaison between the school department and other city departments to ensure the proper accounting and tracking of grant funds.
6. Provide training to school department staff on the use of municipal computerized financial systems and software.
7. Perform other related duties as assigned by the Chief Financial Officer.

- **Position Type:** Full-time
- **Positions Available:** 1

- Job Categories : Administrator > Business/Finance
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Job Requirements

- PROFESSIONAL QUALIFICATIONS:

- 1.A bachelor's degree in business, accounting or finance from an accredited college or university.
- 2.A minimum of two years successful experience in accounting or finance. Municipal accounting or finance experience preferred.
- 3.Demonstrated experience in preparing, expending and monitoring grant budgets.
- 4.Demonstrated ability to develop positive interpersonal relationships within all levels of an organization.
- 5.Excellent oral and written communication skills.
- 6.Excellent organizational and administrative abilities.
- 7.Experience in municipal accounting and financial systems, spreadsheets, word processing applications, database applications, budgetary systems, financial control systems and training of staff preferred.

REPORTS TO: Chief Financial Officer

EFFECTIVE DATE OF EMPLOYMENT: As soon as possible after posting period closes

TERMS OF EMPLOYMENT: Up to a five month assignment

SALARY: \$ 65,000 to \$ 75,000 annually

- At least 2 years of relevant experience preferred
- Bachelor degree preferred
- Citizenship, residency or work visa required